

SPECIMEN REPORT / 6-MONTH PORTFOLIO VIEW

Client-wise status

Portfolio health, delivery signals, open risks and next-week actions by placeholder client.

BUILD TICKET

WIB-101

IN DEMO / SYNTHETIC

06

CLIENTS

03

ON TRACK

01

WATCH

02

AT RISK

What this report tells you

A relationship-level view for account leads and delivery owners. It answers where each client stands, what changed over the six-month window, and which owner action will move the work next.

Leadership readout

- Four of six programs have no red status.
- Lotus and Ember need named owners or external dates.
- No actual customer records or messages are used.

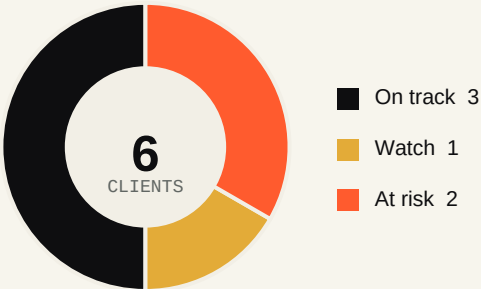
REPORTING BASIS

Synthetic-only sample using placeholder clients Alpha, Lotus, Pearl, Cedar, Nova and Ember. Six-month trend is May-October 2026; October values are month-to-date through 20 October. Action dates are illustrative planning dates for 26-30 October.

Portfolio health and movement

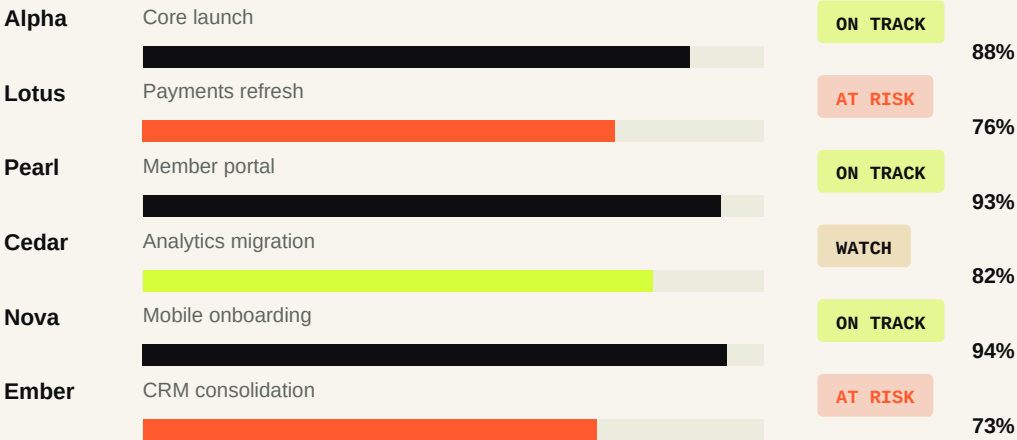
Current status mix and six-month progress trend; October is month-to-date.

Status distribution



Status is an editorial summary of delivery evidence, dependency timing and ownership clarity. It is not a probability score.

Progress by client



Six-month progress is directional and synthetic; it does not represent earned value.

HOW TO READ IT

The portfolio is late-stage overall. Progress percentages summarize modeled work completion; health tags show current delivery attention. A high completion percentage does not cancel a blocked external dependency.

Client-by-client snapshot

Evidence, delivery position and what the status means for the relationship.

Alpha / Core launch

ON TRACK

88% complete

Relationship owner: Iris Lee

API contract signed; pilot scope locked.

NEXT: Confirm pilot acceptance criteria and book certification slot.

Lotus / Payments refresh

AT RISK

76% complete

Relationship owner: Victor Chen

Webhook contract tests are ready for sandbox.

NEXT: Escalate sandbox access; run first end-to-end payment test.

Pearl / Member portal

ON TRACK

93% complete

Relationship owner: Priya Shah

Core flows passed; release candidate is stable.

NEXT: Close accessibility review and confirm release checklist.

Cedar / Analytics migration

WATCH

82% complete

Relationship owner: Omar Reed

Parity checks pass on 94% of sampled rows.

NEXT: Review exception sample and sign off the parity threshold.

Nova / Mobile onboarding

ON TRACK

94% complete

Relationship owner: Ella Park

Demo experiment shows an 8-point completion lift.

NEXT: Approve rollout guardrails and stage the first 50% cohort.

Ember / CRM consolidation

AT RISK

73% complete

Relationship owner: Jamie Fox

Target CRM field map is drafted.

NEXT: Name source owners and confirm a migration rehearsal date.

Risks, dependencies and decisions

Open items that can change client confidence or delivery dates.

TICKET	RISK OR DEPENDENCY	OWNER	TARGET	HEALTH
WIB-LOT-087	Lotus / Gateway sandbox access remains with partner team.	Victor Chen	26-28 Oct	AT RISK
WIB-CED-066	Cedar / Legacy export exceptions need a signed acceptance threshold.	Omar Reed	26-28 Oct	WATCH
WIB-EMB-033	Ember / Two source systems have no named data owner.	Jamie Fox	26-28 Oct	AT RISK

Decision requests

- Lotus: partner lead confirms sandbox access date.
- Cedar: sponsor accepts the 6% exception sample or requests remediation.
- Ember: Sales Ops names owners for both source systems.

Client communication watch

Keep client updates evidence-led: state the owner, next checkpoint and what would move the date. Avoid calling a dependency resolved until the named partner or client owner confirms it.

Next week / client action plan

Planning window: 26-30 October 2026. Dates are illustrative demo commitments.

TICKET	ACTION	OWNER	DUE	STATE
WIB-LOT-087	Secure gateway sandbox access	Victor Chen	26 Oct	BLOCKED
WIB-EMB-033	Name two CRM source owners	Jamie Fox	26 Oct	OPEN
WIB-NOV-072	Approve 50% rollout guardrails	Ella Park	27 Oct	DECISION
WIB-CED-066	Sign data-parity threshold	Omar Reed	28 Oct	OPEN
WIB-PEA-153	Close accessibility sign-off	Priya Shah	29 Oct	IN REVIEW
WIB-ALP-214	Book partner certification slot	Iris Lee	30 Oct	OPEN

What should be true by Friday

- Lotus has a dated sandbox path.
- Nova guardrails are recorded.
- Ember has two named data owners.
- Pearl has a closed accessibility checklist.

Source note: all clients, signals, percentages, owners, ticket IDs and dates are invented. This report is a presentation specimen, not a client communication.